

NEMT - RFP

Technical and Cost Proposal Summary

6 - Year

	Total Technical Proposal	Total Cost Proposal	TOTAL COMBINED SCORE	Rank	
TMS	2607.5	1200	3807.5	1st	
MTM	2680	1010	3690	2nd	MO Call Center
		986	3666	3rd	DSM Call Center
AMR Access 2 Care	2555.5	1050	3605.5	4th	
LogistiCare	2463.5	1066	3529.5	5th	
Ride Source	1915	905	2820	6th	

3 - Year

	Total Technical Proposal	Total Cost Proposal	TOTAL COMBINED SCORE	Rank	
TMS	2607.5	600	3207.5	1st	
MTM	2680	525	3205	2nd	MO Call Center
		512	3192	3rd	DSM Call Center
AMR Access 2 Care	2555.5	546	3101.5	4th	
LogistiCare	2463.5	563	3026.5	5th	
Ride Source	1915	459	2374	6th	

1 - Year

	Total Technical Proposal	Total Cost Proposal	TOTAL COMBINED SCORE	Rank	
MTM	2680	176	2856	1st	MO Call Center
		171	2851	2nd	DSM Call Center
TMS	2607.5	200	2807.5	3rd	
AMR Access 2 Care	2555.5	182	2737.5	4th	
LogistiCare	2463.5	198	2661.5	5th	
Ride Source	1915	150	2065	6th	

NEMT Brokerage: RFP MED-10-011
Cost Proposals Comparison

5.4.3 Scoring of Bidder Cost Proposals

The bid with the lowest cost will receive the full point score available (200) for the cost proposal. In order to calculate every other bidder's score, the lowest bidder's cost proposal will be divided into the corresponding value of the other bidder(s) and then multiplied by the maximum points. The formula for each is expressed as follows:

$$\text{Bidder's Cost Score} = (\text{Lowest Cost} / \text{Bidder Cost}) \times \text{Maximum Points}$$

Vendor	Year 1	Pts.	Year 2	Pts.	Year 3	Pts.	Year 4	Pts.	Year 5	Pts.	Year 6	Pts.	Total Pts.	Div. By 6
TMS Management Group, Inc.	\$ 2.14	200	\$ 2.14	200	\$ 2.14	200	\$ 2.01	200	\$ 2.01	200	\$ 2.01	200	1,200	200
LogistiCare	\$ 2.16	198	\$ 2.32	184	\$ 2.37	181	\$ 2.38	169	\$ 2.40	168	\$ 2.41	167	1,066	178
Access2Care Transportation Solutions	\$ 2.35	182	\$ 2.35	182	\$ 2.35	182	\$ 2.38	169	\$ 2.40	168	\$ 2.40	168	1,050	175
Medical Transportation Management, Inc.														
Missouri Call Center:	\$ 2.43	176	\$ 2.45	175	\$ 2.46	174	\$ 2.47	163	\$ 2.48	162	\$ 2.50	161	1,010	168
Des Moines Call Center:	\$ 2.50	171	\$ 2.51	171	\$ 2.52	170	\$ 2.53	159	\$ 2.54	158	\$ 2.55	158	986	164
RideSource	\$ 2.85	150	\$ 2.80	153	\$ 2.75	156	\$ 2.70	149	\$ 2.70	149	\$ 2.70	149	905	151

NEMT - RFP

Evaluation Team Summary Score Sheet

To be filled out by the Evaluation Team Leader and submitted to the issuing officer.

Evaluator	Ride Source (Bidder name)	LogistiCare (Bidder name)	AMR/Access2Care (Bidder name)	TMS (Bidder name)	MTM (Bidder name)
1	310	460	430	512.5	490
2	355	502.5	570	565	502.5
3	500	500	585	480	570
4	510	546	508	600	600
5	240	465	462.5	450	517.5
TOTAL Points	1915	2463.5	2555.5	2607.5	2680

Date: 4-30-10

Team Leader Signature: 1

1.3.4 Review of Proposal Sections

1.3.4.1 Executive Summary

BIDDER:	Ride Source
EVALUATOR Number:	1

Evaluation Criteria: (from RFP Section 4.2.4. Executive Summary Tab 4)

Consider: Did the bidder clearly demonstrate its strengths and the key features of its proposed approach to meet the requirements of the RFP?

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder presented a comprehensive overview of the services being proposed?


General description of services proposed.

Has the bidder provided a summary of their strengths and identified the key features of their proposed approach to meet the requirements of the RFP?

Strengths - efficiency, automated system (RAMMS).

Has the bidder included a summary of its project management plans?

General description, tentative dates on implementation plan.

Points for this section: EXECUTIVE SUMMARY 50	Times the weight 0% - 100% 60%	Total points 30
Evaluator's Signature 		Date 4/23/10
Second Round of Scoring		
Points for this section: EXECUTIVE SUMMARY 50	Times the weight 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.2 Overall Project Understanding

BIDDER:	Ride Source
EVALUATOR Number:	1

Evaluation Criteria: (Continuation from RFP Section 4.2.4 Executive Summary Tab 4)

Consider: Did the bidder demonstrate in its own words, a clear understanding of the Department's needs?

Evaluator Notes Summary:


(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder demonstrated a clear understanding of the requirements in the RFP?

Fair understanding of requirements.

Has the bidder described how they will adjust to accommodate program changes?

No.

Points for this section: OVERALL PROJECT UNDERSTANDING 50	Times the weight 0% - 100% 40%	Total points 20
Evaluator's Signature 		Date 4/23/10
Second Round of Scoring		
Points for this section: OVERALL PROJECT UNDERSTANDING 50	Times the weight 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.3 General Requirements

BIDDER:	Ride Source
EVALUATOR Number:	1

Evaluation Criteria: (from RFP Section 3.2.1 Service Requirements Tab 5)

Consider the bidder's approach to internal quality assurance.

Consider the bidder's description of their NEMT tracking database.

Consider the bidder's description of their electronic billing and invoice system.

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)


Has the bidder explained their approach to Section 3.2.1 General Requirements and identified each requirement and addressed each requirement?

RAMMS .

will develop procedure manual.

Has the bidder satisfactorily described their approach to and scope of their internal quality assurance activities?

Score card.

Points for this section: GENERAL REQUIREMENTS 50	Times the Assigned % 0% - 100% 60%	Total points 30
Evaluator's Signature 		Date 4/23/10
Second Round of Scoring		
Points for this section: GENERAL REQUIREMENTS 50	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.4 Contractor Responsibilities

BIDDER:	Ride Source
EVALUATOR Number:	1

Evaluation Criteria: (from RFP Sections 3.3.1 and 3.3.2 Service Requirements Tab 5)

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Consider: Did the bidder demonstrate that it has the capability to perform the service requirements?

Consider: The bidder's approach to establishment of a call center and a central business office location?

Consider: The broker's approach to development of a Network plan.

1. RFP section 3.3.2.1 NEMT: Network Providers and Individuals

Has the bidder provided a description of how they will manage the different aspects of the brokerage?

Yes.

Has the bidder provided the detail describing the level of staff for the Account Manager position, and the call center positions, and do the levels meet the requirements for the brokerage?

General manager will be hired.

Has the bidder described how they will make the transportation arrangements for all Medicaid Members who qualify for NEMT services?

Using RAMMS software.

Has the bidder described how they will ensure the provision of necessary NEMT services by establishing a network of providers through the use of subcontracts?

Recruitment program - "Road Show."

Has the bidder described how they will coordinate requests and make decisions on who provides the transportation when Medicaid Members request that someone, other than a Network provider, transport them?

RAMMS ?

2. RFP section 3.3.2.2 Verification of Member Eligibility

Has the bidder described their process for verifying the Medicaid Member's eligibility for NEMT services?

Says RAMMS will integrate w/ UMIS.

3. RFP section 3.3.2.3 Office/Telephone Call Center and Appointments Standards

Has the bidder described their staffing plan for the call center?

Yes.

Has the bidder described how the call center will operate?

Yes.

Has the bidder explained their plan to accommodate passengers who have disabilities or special health care needs?

Says they will build service base of variety of modes of transportation; follow ADA.

Does the bidder explain its process to insure that a Member's pick up wait time is according to the requirements specified in the RFP?

Says time will not exceed 30 minutes - lack of details.

4. RFP section 3.3.2.4 NEMT Reimbursement

Has the bidder explained its NEMT reimbursement process?

Says will be "in compliance w/ state & federal tax reporting laws."

5. RFP section 3.3.2.5 Member Education

Has the bidder explained their process for issuing updates to information provided to Members?

"on an as-needed basis."

6. RFP section 3.3.2.6 Grievance, Complaints and State Fair Hearings System

Has the bidder described their process for providing Members a grievance and complaints process?

RAMMS.

Has the bidder explained its notice of the right to a Fair Hearing for Members and their role in representing the Department in the hearing?

NOI w/ grievance process in RAMMS.

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Points for this section: CONTRACTOR RESPONSIBILITIES 400	Times the Assigned % 0% - 100% 50%	Total points 200
Evaluator's Signature: [REDACTED]		Date 4/23/10
Second Round of Scoring		
Points for this section: CONTRACTOR RESPONSIBILITIES 400	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.5 Corporate/Team Experience & Qualifications

BIDDER:	Ride Source
EVALUATOR Number:	1

Evaluation Criteria: (RFP Section 4.2.6 Tab 6)

Consider: The organization experience with similar projects

Consider: Executive level commitment and a demonstration of their commitment in previous projects

1. RFP section 4.2.6.1 Experience

Has the bidder described all services similar to those sought by this RFP that the bidder has provided to other businesses or governmental entities, including all contracts and projects that the bidder currently holds or is working on, with a contact person's name from that business or governmental entity?

Yes, 7 contacts listed.

Has the bidder identified if the services were timely provided and within budget?

Provides timeliness data for some contracts.

States met deadlines & budget limitations.

Bidder must provide letters of reference, with the following information, from up to three (3) business contacts knowledgeable of the bidder's performance as a primary contractor in providing services similar to the services described in the RFP:

- Project Title
- Contact organization name
- Contact name, title, and current telephone number
- Brief description of scope of work that demonstrates relevance to this RFP.

Additional information that may be included: Original project start and end dates and Total project value to the bidder's organization

Provided 3 letters.

2. RFP section 4.2.6.2 Personnel

Has the bidder submitted a table of organization that describes the following:

- Company's structure, including lines of authority, names and credentials of the owners and executives of the organization and, if applicable, their roles on this project? *Not all names on TO.*
- Key personnel, including the Project Manager, who will be involved in providing services for this RFP?

Yes - current Dir of Op will be Project Mgr.

Are resumes of key personnel submitted that include name, education, and years of experience and employment history, particularly as it relates to the scope of services for this RFP?

Yes

Has information been submitted on other contracts and projects currently undertaken by the bidder?

Yes - 4.2.6.1.1

3. RFP section 4.2.6.3 Financial Information

Has the bidder provided letters of reference from three (3) banking institutions and/or creditors?

- Do the letters depict the bidder's financial viability and are they indicative of future financial stability? *7-figure term debt w/ Wells Fargo.*
- Do the letters provide a contact person and telephone number for each reference? *Yes.*

Has the bidder provided the following organizational background information:

- Full name, address, and telephone number;
- Date established;
- Ownership (i.e. public company, partnership, etc.)
- Description of business operations;
- Details of any proposed mergers, acquisitions, or sales that may affect financial stability or organizational structure; and
- A description, if any, of insurance claims filed within the past five (5) years.

Yes

4. RFP section 4.2.6.4 Termination, Litigation, and Investigation

During the last five (5) years:

Has the bidder had a contract for services terminated for any reason or has any such contract been subject to any form of default notice or threat of termination? **No**

Has the bidder described any damages or penalties or anything of value traded or given up? **No**

Has the bidder listed and summarized pending or threatened litigation, administrative or regulatory proceedings, or similar matters that could affect the ability of the bidder to perform the required services? **No**

Have any of the owners, officers, or primary partners ever been convicted of a felony? **No**

Have any irregularities been discovered in any of the accounts maintained by the bidder on behalf of others? **No**


Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Provides descriptions of other contracts - some info on successful timeliness.

TO has some blanks on names.

Some questions on financial letters.

Points for this section: CORPORATE/TEAM EXPERIENCE & QUALIFICATIONS 50	Times the Assigned % 0% - 100% 60%	Total points 30
Evaluator's Signature 		Date 4/23/10
Second Round of Scoring		
Points for this section: CORPORATE/TEAM EXPERIENCE & QUALIFICATIONS 50	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.5 Technical Proposal Evaluation Report

The Department is interested in proposals that provide well-organized, all-inclusive, and technically sound business solutions. Ambiguous explanations will challenge the proposer's credibility and will result in a negative impact upon the bidder's evaluation report.

The Technical Proposal Evaluation Team will compile a Technical Proposal Evaluation Report. The Report will contain, at a minimum:

- A tool to record impressions and other comments (such as follow up questions for the evaluation team) developed during the proposal evaluation for each respective bidder.
- Individual bidder score sheets that will include the individual evaluator scores and the final calculated average score for the bidder
- Compilation of bidder average scores for all bidders, including their final Technical Proposal ranking

Ride Source -

- RAMMS computer system.
- Payment w/in 7 days
- Hybrids
- GM, Provider Network Mgr, QC Mgr, Administrator
- Customer service results
- Call center in AZ - could employ 14 reps
- CEO - Pres of Vaultrans
- Dir of Admin - Base Nine Inc

1.3.4 Review of Proposal Sections

1.3.4.1 Executive Summary

BIDDER:	Ride Source
EVALUATOR Number:	2

Evaluation Criteria: (from RFP Section 4.2.4. Executive Summary Tab 4)

Consider: Did the bidder clearly demonstrate its strengths and the key features of its proposed approach to meet the requirements of the RFP?

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder presented a comprehensive overview of the services being proposed?

✓

Has the bidder provided a summary of their strengths and identified the key features of their proposed approach to meet the requirements of the RFP?

✓

Has the bidder included a summary of its project management plans?

✓

Points for this section: EXECUTIVE SUMMARY 50	Times the weight 0% - 100% 60	Total points 30
Evaluator's Signature		Date
Second Round of Scoring		
Points for this section: EXECUTIVE SUMMARY 50	Times the weight 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.2 Overall Project Understanding

BIDDER:	
EVALUATOR Number:	

Evaluation Criteria: (Continuation from RFP Section 4.2.4 Executive Summary Tab 4)

Consider: Did the bidder demonstrate in its own words, a clear understanding of the Department's needs?

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder demonstrated a clear understanding of the requirements in the RFP?



Has the bidder described how they will adjust to accommodate program changes?



Points for this section: OVERALL PROJECT UNDERSTANDING 50	Times the weight 0% - 100% 60	Total points 30
Evaluator's Signature		Date
Second Round of Scoring		
Points for this section: OVERALL PROJECT UNDERSTANDING 50	Times the weight 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.3 General Requirements

BIDDER:	
EVALUATOR Number:	

Evaluation Criteria: (from RFP Section 3.2.1 Service Requirements Tab 5)

Consider the bidder's approach to internal quality assurance.

Consider the bidder's description of their NEMT tracking database.

Consider the bidder's description of their electronic billing and invoice system.

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder explained their approach to Section 3.2.1 General Requirements and identified each requirement and addressed each requirement?

✓

Has the bidder satisfactorily described their approach to and scope of their internal quality assurance activities?

✓

Points for this section: GENERAL REQUIREMENTS 50	Times the Assigned % 0% - 100% 70	Total points 35
Evaluator's Signature		Date
Second Round of Scoring		
Points for this section: GENERAL REQUIREMENTS 50	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.4 Contractor Responsibilities

BIDDER:	
EVALUATOR Number:	

Evaluation Criteria: (from RFP Sections 3.3.1 and 3.3.2 Service Requirements Tab 5)

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Consider: Did the bidder demonstrate that it has the capability to perform the service requirements?

Consider: The bidder's approach to establishment of a call center and a central business office location?

Consider: The broker's approach to development of a Network plan.

1. RFP section 3.3.2.1 NEMT: Network Providers and Individuals

Has the bidder provided a description of how they will manage the different aspects of the brokerage?

somewhat.

Has the bidder provided the detail describing the level of staff for the Account Manager position, and the call center positions, and do the levels meet the requirements for the brokerage?

somewhat.

Has the bidder described how they will make the transportation arrangements for all Medicaid Members who qualify for NEMT services?

not clearly.

Has the bidder described how they will ensure the provision of necessary NEMT services by establishing a network of providers through the use of subcontracts?

not clearly

Has the bidder described how they will coordinate requests and make decisions on who provides the transportation when Medicaid Members request that someone, other than a Network provider, transport them?

not clearly

2. RFP section 3.3.2.2 Verification of Member Eligibility

Has the bidder described their process for verifying the Medicaid Member's eligibility for NEMT services?

yes

3. RFP section 3.3.2.3 Office/Telephone Call Center and Appointments Standards

Has the bidder described their staffing plan for the call center?

not clear

Has the bidder described how the call center will operate?

no

Has the bidder explained their plan to accommodate passengers who have disabilities or special health care needs?

yes

Does the bidder explain its process to insure that a Member's pick up wait time is according to the requirements specified in the RFP?

yes

4. RFP section 3.3.2.4 NEMT Reimbursement

Has the bidder explained its NEMT reimbursement process?

yes

5. RFP section 3.3.2.5 Member Education

Has the bidder explained their process for issuing updates to information provided to Members?

yes

6. RFP section 3.3.2.6 Grievance, Complaints and State Fair Hearings System

Has the bidder described their process for providing Members a grievance and complaints process?

yes

Has the bidder explained its notice of the right to a Fair Hearing for Members and their role in representing the Department in the hearing?

yes

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Points for this section: CONTRACTOR RESPONSIBILITIES 400	Times the Assigned % 0% - 100% 60	Total points 240
Evaluator's Signature		Date
Second Round of Scoring		
Points for this section: CONTRACTOR RESPONSIBILITIES 400	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.5 Corporate/Team Experience & Qualifications

BIDDER:	
EVALUATOR Number:	

Evaluation Criteria: (RFP Section 4.2.6 Tab 6)

Consider: The organization experience with similar projects

Consider: Executive level commitment and a demonstration of their commitment in previous projects

1. RFP section 4.2.6.1 Experience

Has the bidder described all services similar to those sought by this RFP that the bidder has provided to other businesses or governmental entities, including all contracts and projects that the bidder currently holds or is working on, with a contact person's name from that business or governmental entity?

Has the bidder identified if the services were timely provided and within budget?

Bidder must provide letters of reference, with the following information, from up to three (3) business contacts knowledgeable of the bidder's performance as a primary contractor in providing services similar to the services described in the RFP:

- Project Title
- Contact organization name
- Contact name, title, and current telephone number
- Brief description of scope of work that demonstrates relevance to this RFP.

Additional information that may be included: Original project start and end dates and Total project value to the bidder's organization

2. RFP section 4.2.6.2 Personnel

Has the bidder submitted a table of organization that describes the following:

- Company's structure, including lines of authority, names and credentials of the owners and executives of the organization and, if applicable, their roles on this project?
- Key personnel, including the Project Manager, who will be involved in providing services for this RFP?

Are resumes of key personnel submitted that include name, education, and years of experience and employment history, particularly as it relates to the scope of services for this RFP?

Has information been submitted on other contracts and projects currently undertaken by the bidder?

3. RFP section 4.2.6.3 Financial Information

Has the bidder provided letters of reference from three (3) banking institutions and/or creditors?

- Do the letters depict the bidder's financial viability and are they indicative of future financial stability?
- Do the letters provide a contact person and telephone number for each reference?

Has the bidder provided the following organizational background information:

- Full name, address, and telephone number;
- Date established;
- Ownership (i.e. public company, partnership, etc.)
- Description of business operations;
- Details of any proposed mergers, acquisitions, or sales that may affect financial stability or organizational structure; and
- A description, if any, of insurance claims filed within the past five (5) years.

4. RFP section 4.2.6.4 Termination, Litigation, and Investigation

During the last five (5) years:

Has the bidder had a contract for services terminated for any reason or has any such contract been subject to any form of default notice or threat of termination?

Has the bidder described any damages or penalties or anything of value traded or given up?

Has the bidder listed and summarized pending or threatened litigation, administrative or regulatory proceedings, or similar matters that could affect the ability of the bidder to perform the required services?

Have any of the owners, officers, or primary partners ever been convicted of a felony?

Have any irregularities been discovered in any of the accounts maintained by the bidder on behalf of others?

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

- 26 yrs. in business.
- Relatively small co. located in AZ
- Did not provide specific ^{office} location. Utilizing existing Call Center in AZ.
- Did not explain how the existing Call Center works.

Points for this section: CORPORATE/TEAM EXPERIENCE & QUALIFICATIONS 50	Times the Assigned % 0% - 100% 40	Total points 20
Evaluator's Signature		Date
Second Round of Scoring		
Points for this section: CORPORATE/TEAM EXPERIENCE & QUALIFICATIONS 50	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4 Review of Proposal Sections

1.3.4.1 Executive Summary

BIDDER:	RideSource Glendale, Az
EVALUATOR Number:	3

Evaluation Criteria: (from RFP Section 4.2.4. Executive Summary Tab 4)

Consider: Did the bidder clearly demonstrate its strengths and the key features of its proposed approach to meet the requirements of the RFP?

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder presented a comprehensive overview of the services being proposed?

Yes.

Has the bidder provided a summary of their strengths and identified the key features of their proposed approach to meet the requirements of the RFP?

Yes - very well

Has the bidder included a summary of its project management plans?

Yes - detailed in Appendix A

Points for this section: EXECUTIVE SUMMARY 50	Times the weight 0% - 100%	Total points 50
Evaluator's Signature		Date 4/23/10
Second Round of Scoring		
Points for this section: EXECUTIVE SUMMARY 50	Times the weight 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.2 Overall Project Understanding

BIDDER:	Ride Source
EVALUATOR Number:	3

Evaluation Criteria: (Continuation from RFP Section 4.2.4 Executive Summary Tab 4)

Consider: Did the bidder demonstrate in its own words, a clear understanding of the Department's needs?

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder demonstrated a clear understanding of the requirements in the RFP?

Yes

Has the bidder described how they will adjust to accommodate program changes?

didn't really address this

Points for this section: OVERALL PROJECT UNDERSTANDING 50	Times the weight 0% - 100%	Total points 25
Evaluator's Signature		Date 4/23/10
Second Round of Scoring		
Points for this section: OVERALL PROJECT UNDERSTANDING 50	Times the weight 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.3 General Requirements

BIDDER:	
EVALUATOR Number:	

Evaluation Criteria: (from RFP Section 3.2.1 Service Requirements Tab 5)

Consider the bidder's approach to internal quality assurance.

Consider the bidder's description of their NEMT tracking database.

Consider the bidder's description of their electronic billing and invoice system.

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder explained their approach to Section 3.2.1 General Requirements and identified each requirement and addressed each requirement?

Yes

Has the bidder satisfactorily described their approach to and scope of their internal quality assurance activities?

Yes - QA activities happen regularly and timely. More proactive than reactive

Points for this section: GENERAL REQUIREMENTS 50	Times the Assigned % 0% - 100%	Total points 40
Evaluator's Signature		Date 4/23/10
Second Round of Scoring		
Points for this section: GENERAL REQUIREMENTS 50	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.4 Contractor Responsibilities

BIDDER:	<i>Ride Source</i>
EVALUATOR Number:	<i>3</i>

Evaluation Criteria: (from RFP Sections 3.3.1 and 3.3.2 Service Requirements Tab 5)

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Consider: Did the bidder demonstrate that it has the capability to perform the service requirements?

Consider: The bidder's approach to establishment of a call center and a central business office location?

Consider: The broker's approach to development of a Network plan.

1. RFP section 3.3.2.1 NEMT: Network Providers and Individuals

Has the bidder provided a description of how they will manage the different aspects of the brokerage?

Yes. Would really like to see what RAMUS actually does

Has the bidder provided the detail describing the level of staff for the Account Manager position, and the call center positions, and do the levels meet the requirements for the brokerage?

*Yes, seems to be well coordinated & thought out
1/2 established already pg. 20.*

Has the bidder described how they will make the transportation arrangements for all Medicaid Members who qualify for NEMT services?

Yes, using RAMUS - also does verification of eligibility

Has the bidder described how they will ensure the provision of necessary NEMT services by establishing a network of providers through the use of subcontracts?

Yes, described how they recruit providers in detail - also included examples of materials used

Has the bidder described how they will coordinate requests and make decisions on who provides the transportation when Medicaid Members request that someone, other than a Network provider, transport them?

Yes. No problem having other people; Volunteers etc. provide transportation. Will be subject to same regs as regular providers it appears.

2. RFP section 3.3.2.2 Verification of Member Eligibility

Has the bidder described their process for verifying the Medicaid Member's eligibility for NEMT services?

integrate between MMIS/RAMIS

No waiting period providing info is up to date from DHS.

3. RFP section 3.3.2.3 Office/Telephone Call Center and Appointments Standards

Has the bidder described their staffing plan for the call center?

Yes - seems to already be in motion

Has the bidder described how the call center will operate?

Yes,

Has the bidder explained their plan to accommodate passengers who have disabilities or special health care needs?

Yes, whatever they can do & need to do

Does the bidder explain its process to insure that a Member's pick up wait time is according to the requirements specified in the RFP?

Yes. Describes procedure for delay due to extended appts also.

4. RFP section 3.3.2.4 NEMT Reimbursement

Has the bidder explained its NEMT reimbursement process?

In general, will follow rules/regs

5. RFP section 3.3.2.5 Member Education

Has the bidder explained their process for issuing updates to information provided to Members?

will provide updates on as-needed basis & in the desired time frame

6. RFP section 3.3.2.6 Grievance, Complaints and State Fair Hearings System

Has the bidder described their process for providing Members a grievance and complaints process? Yes, NOD & any info needed to comply

Has the bidder explained its notice of the right to a Fair Hearing for Members and their role in representing the Department in the hearing?

Yes. clear on their role

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Points for this section: CONTRACTOR RESPONSIBILITIES 400	Times the Assigned % 0% - 100%	Total points 340
Evaluator's Signature		Date 4/23/10
Second Round of Scoring		
Points for this section: CONTRACTOR RESPONSIBILITIES 400	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.5 Corporate/Team Experience & Qualifications

BIDDER:	RideSource
EVALUATOR Number:	3

Evaluation Criteria: (RFP Section 4.2.6 Tab 6)

Consider: The organization experience with similar projects

Consider: Executive level commitment and a demonstration of their commitment in previous projects

1. RFP section 4.2.6.1 Experience

Has the bidder described all services similar to those sought by this RFP that the bidder has provided to other businesses or governmental entities, including all contracts and projects that the bidder currently holds or is working on, with a contact person's name from that business or governmental entity?

Yes.

Has the bidder identified if the services were timely provided and within budget?

Yes, clearly.

Bidder must provide letters of reference, with the following information, from up to three (3) business contacts knowledgeable of the bidder's performance as a primary contractor in providing services similar to the services described in the RFP:

- Project Title
- Contact organization name
- Contact name, title, and current telephone number
- Brief description of scope of work that demonstrates relevance to this RFP.

Additional information that may be included: Original project start and end dates and Total project value to the bidder's organization

Yes.

2. RFP section 4.2.6.2 Personnel

Has the bidder submitted a table of organization that describes the following:

- Company's structure, including lines of authority, names and credentials of the owners and executives of the organization and, if applicable, their roles on this project? *pretty much*
- Key personnel, including the Project Manager, who will be involved in providing services for this RFP? *No*

Are resumes of key personnel submitted that include name, education, and years of experience and employment history, particularly as it relates to the scope of services for this RFP?

Yes

Has information been submitted on other contracts and projects currently undertaken by the bidder?

No

3. RFP section 4.2.6.3 Financial Information

Also provided financial statements

Has the bidder provided letters of reference from three (3) banking institutions and/or creditors?

- Do the letters depict the bidder's financial viability and are they indicative of future financial stability? *Yes*
- Do the letters provide a contact person and telephone number for each reference? *Yes*

Has the bidder provided the following organizational background information:

- Full name, address, and telephone number; *Yes*
- Date established;
- Ownership (i.e. public company, partnership, etc.)
- Description of business operations;
- Details of any proposed mergers, acquisitions, or sales that may affect financial stability or organizational structure; and
- A description, if any, of insurance claims filed within the past five (5) years.

4. RFP section 4.2.6.4 Termination, Litigation, and Investigation

During the last five (5) years:

Has the bidder had a contract for services terminated for any reason or has any such contract been subject to any form of default notice or threat of termination?

No

Has the bidder described any damages or penalties or anything of value traded or given up?

No

Has the bidder listed and summarized pending or threatened litigation, administrative or regulatory proceedings, or similar matters that could affect the ability of the bidder to perform the required services?

No

Have any of the owners, officers, or primary partners ever been convicted of a felony?

No

Have any irregularities been discovered in any of the accounts maintained by the bidder on behalf of others?

No

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Points for this section: CORPORATE/TEAM EXPERIENCE & QUALIFICATIONS 50	Times the Assigned % 0% - 100%	Total points 45
Evaluator's Signature		Date 4/23/10
Second Round of Scoring		
Points for this section: CORPORATE/TEAM EXPERIENCE & QUALIFICATIONS 50	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4 Review of Proposal Sections

1.3.4.1 Executive Summary

BIDDER:	<i>Total Transit</i>
EVALUATOR Number:	<i>H</i>

Evaluation Criteria: (from RFP Section 4.2.4. Executive Summary Tab 4)

Consider: Did the bidder clearly demonstrate its strengths and the key features of its proposed approach to meet the requirements of the RFP?

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder presented a comprehensive overview of the services being proposed?

*Not completely clear & understand difference in their company
Very short - Not much detail*

Has the bidder provided a summary of their strengths and identified the key features of their proposed approach to meet the requirements of the RFP?

Yes B 7 Not much detail

Has the bidder included a summary of its project management plans?

Yes - Very brief

Points for this section: EXECUTIVE SUMMARY 50	Times the weight 0% - 100% <i>90</i>	Total points <i>45</i>
Evaluator's Signature		Date
Second Round of Scoring		
Points for this section: EXECUTIVE SUMMARY 50	Times the weight 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.2 Overall Project Understanding

BIDDER:	<i>Red Source</i>
EVALUATOR Number:	<i>4</i>

Evaluation Criteria: (Continuation from RFP Section 4.2.4 Executive Summary Tab 4)

Consider: Did the bidder demonstrate in its own words, a clear understanding of the Department's needs?

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder demonstrated a clear understanding of the requirements in the RFP?

Very brief (that the understanding)

Has the bidder described how they will adjust to accommodate program changes?

No

Points for this section: OVERALL PROJECT UNDERSTANDING 50	Times the weight 0% - 100% <i>90</i>	Total points <i>45</i>
Evaluator's Signature		Date
Second Round of Scoring		
Points for this section: OVERALL PROJECT UNDERSTANDING 50	Times the weight 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.3 General Requirements

BIDDER:	<i>Ride Source</i>
EVALUATOR Number:	<i>4</i>

Evaluation Criteria: (from RFP Section 3.2.1 Service Requirements Tab 5)

Consider the bidder's approach to internal quality assurance.

Consider the bidder's description of their NEMT tracking database.

Consider the bidder's description of their electronic billing and invoice system.

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder explained their approach to Section 3.2.1 General Requirements and identified each requirement and addressed each requirement?

QA- Yes
Tracking RAMMS System
Billing RAMMS System

Has the bidder satisfactorily described their approach to and scope of their internal quality assurance activities?

Yes Monthly scorecards

Points for this section: GENERAL REQUIREMENTS 50	Times the Assigned % 0% - 100%	Total points <i>50</i>
Evaluator's Signature		Date <i>4/28/10</i>
Second Round of Scoring		
Points for this section: GENERAL REQUIREMENTS 50	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.4 Contractor Responsibilities

BIDDER:	<i>Rich Source</i>
EVALUATOR Number:	<i>4</i>

Evaluation Criteria: (from RFP Sections 3.3.1 and 3.3.2 Service Requirements Tab 5)

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Consider: Did the bidder demonstrate that it has the capability to perform the service requirements?

Consider: The bidder's approach to establishment of a call center and a central business office location?

Consider: The broker's approach to development of a Network plan.

1. RFP section 3.3.2.1 NEMT: Network Providers and Individuals

Has the bidder provided a description of how they will manage the different aspects of the brokerage?

Outlined pgs - 11 → 13

Has the bidder provided the detail describing the level of staff for the Account Manager position, and the call center positions, and do the levels meet the requirements for the brokerage?

*Addressed Will appoint Manager
Will utilize Premier Call Center & hire dedicated IT
worker as a critical Agent*

Has the bidder described how they will make the transportation arrangements for all Medicaid Members who qualify for NEMT services?

RAMMS system

Has the bidder described how they will ensure the provision of necessary NEMT services by establishing a network of providers through the use of subcontracts?

*Described
Will do a local 5th level to recruit providers*

Has the bidder described how they will coordinate requests and make decisions on who provides the transportation when Medicaid Members request that someone, other than a Network provider, transport them?

Yes - they will have volunteer drivers who pass standards

2. RFP section 3.3.2.2 Verification of Member Eligibility

Has the bidder described their process for verifying the Medicaid Member's eligibility for NEMT services?

Use RAMMS

3. RFP section 3.3.2.3 Office/Telephone Call Center and Appointments Standards

Has the bidder described their staffing plan for the call center?

Yes - Phoenix Center + virtual agents

Has the bidder described how the call center will operate?

Yes Company wants Phoenix because of its existing systems + technology

Has the bidder explained their plan to accommodate passengers who have disabilities or special health care needs?

Not found

Does the bidder explain its process to insure that a Member's pick up wait time is according to the requirements specified in the RFP?

RAMMS Ride Assignments

4. RFP section 3.3.2.4 NEMT Reimbursement

Has the bidder explained its NEMT reimbursement process?

Yes RAMMS

5. RFP section 3.3.2.5 Member Education

Has the bidder explained their process for issuing updates to information provided to Members?

Yes will make notices available

6. RFP section 3.3.2.6 Grievance, Complaints and State Fair Hearings System

Has the bidder described their process for providing Members a grievance and complaints process?

Yes address it

Has the bidder explained its notice of the right to a Fair Hearing for Members and their role in representing the Department in the hearing?

Yes addressed

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Overall - Letter A to B

Points for this section: CONTRACTOR RESPONSIBILITIES 400	Times the Assigned % 0% - 100% 80	Total points 320
Evaluator's Signature		Date 4/15/10
Second Round of Scoring		
Points for this section: CONTRACTOR RESPONSIBILITIES 400	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.5 Corporate/Team Experience & Qualifications

BIDDER:	<i>Ride Shores</i>
EVALUATOR Number:	<i>41</i>

Evaluation Criteria: (RFP Section 4.2.6 Tab 6)

Consider: The organization experience with similar projects

Consider: Executive level commitment and a demonstration of their commitment in previous projects

1. RFP section 4.2.6.1 Experience

Has the bidder described all services similar to those sought by this RFP that the bidder has provided to other businesses or governmental entities, including all contracts and projects that the bidder currently holds or is working on, with a contact person's name from that business or governmental entity?

Has the bidder identified if the services were timely provided and within budget?

Bidder must provide letters of reference, with the following information, from up to three (3) business contacts knowledgeable of the bidder's performance as a primary contractor in providing services similar to the services described in the RFP:

- Project Title
- Contact organization name
- Contact name, title, and current telephone number
- Brief description of scope of work that demonstrates relevance to this RFP.

Additional information that may be included: Original project start and end dates and Total project value to the bidder's organization

2. RFP section 4.2.6.2 Personnel

Has the bidder submitted a table of organization that describes the following:

- Company's structure, including lines of authority, names and credentials of the owners and executives of the organization and, if applicable, their roles on this project? *Yes*
- Key personnel, including the Project Manager, who will be involved in providing services for this RFP? *Yes*

Are resumes of key personnel submitted that include name, education, and years of experience and employment history, particularly as it relates to the scope of services for this RFP?

Yes

Has information been submitted on other contracts and projects currently undertaken by the bidder?

Yes

3. RFP section 4.2.6.3 Financial Information

Has the bidder provided letters of reference from three (3) banking institutions and/or creditors?

- Do the letters depict the bidder's financial viability and are they indicative of future financial stability? *Yes*
- Do the letters provide a contact person and telephone number for each reference? *Yes*

Has the bidder provided the following organizational background information:

- Full name, address, and telephone number; *Yes*
- Date established; *Yes (approx. 2000)*
- Ownership (i.e. public company, partnership, etc.) *Yes*
- Description of business operations; *Yes*
- Details of any proposed mergers, acquisitions, or sales that may affect financial stability or organizational structure; and
- A description, if any, of insurance claims filed within the past five (5) years. *Yes (none)*

4. RFP section 4.2.6.4 Termination, Litigation, and Investigation

During the last five (5) years:

Has the bidder had a contract for services terminated for any reason or has any such contract been subject to any form of default notice or threat of termination? *No*

Has the bidder described any damages or penalties or anything of value traded or given up? *No*

Has the bidder listed and summarized pending or threatened litigation, administrative or regulatory proceedings, or similar matters that could affect the ability of the bidder to perform the required services? *No*

Have any of the owners, officers, or primary partners ever been convicted of a felony? *No*

Have any irregularities been discovered in any of the accounts maintained by the bidder on behalf of others? *No*

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Points for this section: CORPORATE/TEAM EXPERIENCE & QUALIFICATIONS 50	Times the Assigned % 0% - 100%	Total points 50
Evaluator's Signature		Date
Second Round of Scoring		
Points for this section: CORPORATE/TEAM EXPERIENCE & QUALIFICATIONS 50	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.5 Technical Proposal Evaluation Report

The Department is interested in proposals that provide well-organized, all-inclusive, and technically sound business solutions. Ambiguous explanations will challenge the proposer's credibility and will result in a negative impact upon the bidder's evaluation report.

The Technical Proposal Evaluation Team will compile a Technical Proposal Evaluation Report. The Report will contain, at a minimum:

- A tool to record impressions and other comments (such as follow up questions for the evaluation team) developed during the proposal evaluation for each respective bidder.
- Individual bidder score sheets that will include the individual evaluator scores and the final calculated average score for the bidder
- Compilation of bidder average scores for all bidders, including their final Technical Proposal ranking

1.3.4 Review of Proposal Sections

1.3.4.1 Executive Summary

BIDDER:	Ride Source / Total Transit
EVALUATOR Number:	5

Evaluation Criteria: (from RFP Section 4.2.4, Executive Summary Tab 4)

Consider: Did the bidder clearly demonstrate its strengths and the key features of its proposed approach to meet the requirements of the RFP?

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder presented a comprehensive overview of the services being proposed?

51ayer Unclear how broker is verifying that rider and process ride meet eligibility standards

Has the bidder provided a summary of their strengths and identified the key features of their proposed approach to meet the requirements of the RFP?

Key feature seems to focus on automation, but process not really described

Has the bidder included a summary of its project management plans?

4 positions in Iowa "Summary" merely lists issues it will address.

Points for this section: EXECUTIVE SUMMARY 50	Times the weight 0% - 100% 40	Total points 20
Evaluator's Signature		Date 4/21
Second Round of Scoring		
Points for this section: EXECUTIVE SUMMARY 50	Times the weight 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.2 Overall Project Understanding

BIDDER:	RideSource / Total Transit
EVALUATOR Number:	5

Evaluation Criteria: (Continuation from RFP Section 4.2.4 Executive Summary Tab 4)

Consider: Did the bidder demonstrate in its own words, a clear understanding of the Department's needs?

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder demonstrated a clear understanding of the requirements in the RFP?

General

Has the bidder described how they will adjust to accommodate program changes?

?

Points for this section: OVERALL PROJECT UNDERSTANDING 50	Times the weight 0% - 100% 50	Total points 25
Evaluator's Signature =		Date 4/21
Second Round of Scoring		
Points for this section: OVERALL PROJECT UNDERSTANDING 50	Times the weight 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.3 General Requirements

BIDDER:	Ride Source / Total Transit
EVALUATOR Number:	5

Evaluation Criteria: (from RFP Section 3.2.1 Service Requirements Tab 5)

Consider the bidder's approach to internal quality assurance.

Consider the bidder's description of their NEMT tracking database.

Consider the bidder's description of their electronic billing and invoice system.

Evaluator Notes Summary:


(Briefly summarize the reasons that best support your evaluation rating.)

Has the bidder explained their approach to Section 3.2.1 General Requirements and identified each requirement and addressed each requirement?

Yes Much of their response relies on capability of automated systems which are not explain in great detail.

Has the bidder satisfactorily described their approach to and scope of their internal quality assurance activities?

Yes Again, much is based on used of existing automated systems.

Points for this section: GENERAL REQUIREMENTS 50	Times the Assigned % 0% - 100% 40	Total points 20
Evaluator's Signature		Date 4/21
Second Round of Scoring		
Points for this section: GENERAL REQUIREMENTS 50	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.4 Contractor Responsibilities

BIDDER:	Ride Source / Total Transit
EVALUATOR Number:	

Evaluation Criteria: (from RFP Sections 3.3.1 and 3.3.2 Service Requirements Tab 5)

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Consider: Did the bidder demonstrate that it has the capability to perform the service requirements?

Consider: The bidder's approach to establishment of a call center and a central business office location?

Consider: The broker's approach to development of a Network plan.

1. RFP section 3.3.2.1 NEMT: Network Providers and Individuals

Has the bidder provided a description of how they will manage the different aspects of the brokerage?

Yes seems to rely primarily on existing automated system, using relatively few Iowa-based staff, backed by corporate staff in AZ

Has the bidder provided the detail describing the level of staff for the Account Manager position, and the call center positions, and do the levels meet the requirements for the brokerage?

? 4 positions in Iowa all call center functions based in AZ

Has the bidder described how they will make the transportation arrangements for all Medicaid Members who qualify for NEMT services?

Yes Reference to automated system, not sure all contingencies addressed actual process not clearly described

Has the bidder described how they will ensure the provision of necessary NEMT services by establishing a network of providers through the use of subcontracts?

described establishment of network but not sure they've addressed issue of "ensuring" provision of services

Has the bidder described how they will coordinate requests and make decisions on who provides the transportation when Medicaid Members request that someone, other than a Network provider, transport them?

No

2. RFP section 3.3.2.2 Verification of Member Eligibility

Has the bidder described their process for verifying the Medicaid Member's eligibility for NEMT services?

Reference to automated system

3. RFP section 3.3.2.3 Office/Telephone Call Center and Appointments Standards

Has the bidder described their staffing plan for the call center?

Call center based in AZ, possibly with "virtual agents" in Iowa or elsewhere in US

Has the bidder described how the call center will operate?

Yes

Has the bidder explained their plan to accommodate passengers who have disabilities or special health care needs?

Yes

Does the bidder explain its process to insure that a Member's pick up wait time is according to the requirements specified in the RFP?

?

4. RFP section 3.3.2.4 NEMT Reimbursement

Has the bidder explained its NEMT reimbursement process?

?

5. RFP section 3.3.2.5 Member Education

Has the bidder explained their process for issuing updates to information provided to Members?

Merely say they will do so.

6. RFP section 3.3.2.6 Grievance, Complaints and State Fair Hearings System

Has the bidder described their process for providing Members a grievance and complaints process?

Reliance on automated system, but no discussion of how aggrieved parties access system.

Has the bidder explained its notice of the right to a Fair Hearing for Members and their role in representing the Department in the hearing?

~~Stated~~ Said they will do so, but not much explanation

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Points for this section: CONTRACTOR RESPONSIBILITIES 400	Times the Assigned % 0% - 100% 40	Total points 160
Evaluator's Signature		Date 4/21
Second Round of Scoring		
Points for this section: CONTRACTOR RESPONSIBILITIES 400	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date

1.3.4.5 Corporate/Team Experience & Qualifications

BIDDER:	RideSource / Total Transit
EVALUATOR Number:	5

Evaluation Criteria: (RFP Section 4.2.6 Tab 6)

Consider: The organization experience with similar projects

Consider: Executive level commitment and a demonstration of their commitment in previous projects

1. RFP section 4.2.6.1 Experience

Has the bidder described all services similar to those sought by this RFP that the bidder has provided to other businesses or governmental entities, including all contracts and projects that the bidder currently holds or is working on, with a contact person's name from that business or governmental entity?

~~Yes~~ Phoenix Health Plan seems to be

Unclear whether cited experience is broker or

Has the bidder identified if the services were timely provided and within budget?

Yes

direct service
Appears Phoenix Health Plan may be only brokerage

Bidder must provide letters of reference, with the following information, from up to three (3) business contacts knowledgeable of the bidder's performance as a primary contractor in providing services similar to the services described in the RFP:

- Project Title
- Contact organization name
- Contact name, title, and current telephone number
- Brief description of scope of work that demonstrates relevance to this RFP.

Additional information that may be included: Original project start and end dates and Total project value to the bidder's organization

~~Again not clear what RFP sound~~

2. RFP section 4.2.6.2 Personnel

Has the bidder submitted a table of organization that describes the following:

- Company's structure, including lines of authority, names and credentials of the owners and executives of the organization and, if applicable, their roles on this project? *Fairly vague on exact role of participants and on positioning of Iowa project within overall corp structure*
- Key personnel, including the Project Manager, who will be involved in providing services for this RFP? *Yes, but same comment*

Are resumes of key personnel submitted that include name, education, and years of experience and employment history, particularly as it relates to the scope of services for this RFP?

Does not do very good job of relating to role under services relative to this RFP

Has information been submitted on other contracts and projects currently undertaken by the bidder?

Not specifically addressed ~~but~~ other than info in 4.2.6.1

3. RFP section 4.2.6.3 Financial Information

Has the bidder provided letters of reference from three (3) banking institutions and/or creditors?

- One unsigned*
- Do the letters depict the bidder's financial viability and are they indicative of future financial stability?
 - Do the letters provide a contact person and telephone number for each reference?

Has the bidder provided the following organizational background information:

Yes

- Full name, address, and telephone number;
- Date established;
- Ownership (i.e. public company, partnership, etc.)
- Description of business operations;
- Details of any proposed mergers, acquisitions, or sales that may affect financial stability or organizational structure; and
- A description, if any, of insurance claims filed within the past five (5) years.

4. RFP section 4.2.6.4 Termination, Litigation, and Investigation

During the last five (5) years:

Has the bidder had a contract for services terminated for any reason or has any such contract been subject to any form of default notice or threat of termination?

No
Has the bidder described any damages or penalties or anything of value traded or given up?
No

Has the bidder listed and summarized pending or threatened litigation, administrative or regulatory proceedings, or similar matters that could affect the ability of the bidder to perform the required services?

No
Have any of the owners, officers, or primary partners ever been convicted of a felony?

No
Have any irregularities been discovered in any of the accounts maintained by the bidder on behalf of others?

No

Evaluator Notes Summary:

(Briefly summarize the reasons that best support your evaluation rating.)

Points for this section: CORPORATE/TEAM EXPERIENCE & QUALIFICATIONS 50	Times the Assigned % 0% - 100% 30	Total points 15
Evaluator's Signature		Date 4/21
Second Round of Scoring		
Points for this section: CORPORATE/TEAM EXPERIENCE & QUALIFICATIONS 50	Times the Assigned % 0% - 100%	Total points
Evaluator's Signature		Date
RFP Project Director Signature		Date